Standard Work Sheet

Form:	PCS 1.11	Checklist Transmittals through PROCORE	
Who: Agency Point of Contact (POC) Procurement Officer (PO) Construction Compliance Officer (CCO) Construction Program Specialist (CPS) Project Manager (PM)		**Owner:** GSD PCS	Date: 11/29/18
			Revision: 1 - 1/16/19 2 - 5/23/19
1	CPS	CPS will send Checklists as a Transmittal through PROCORE, along with return instructions. Checklists that will be sent are: ● Contract Review Checklists (Design and Construction) ● Risk Exposure Checklist ● Statutory Review Checklist ● *Drawing Submittal Requirements**	
2	POC/PM	POC/PM will receive the Transmittal as an email from PROCORE, and will download the attached Checklist(s). POC/PM will ensure all Statutes, Rules, and Executive Orders have been followed, and will then complete, sign and date the Checklist(s), with the exception of the Drawing Submittal Requirements. **Drawing Submittal Requirements will be returned as the cover page when plans are submitted for Third Party Review.*	
3	POC/PM	POC/PM will return the signed/dated Checklist(s) in PROCORE as follows: a. Open the project in PROCORE by entering the project number or project description in the "Search for projects" box:	

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b. Once your project is open, select Project Tools, and select **Transmittals** under Project Management:

c. Select "Create" in the orange box at the top right corner.
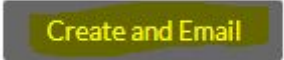
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d. Input Subject depending on which checklist you are returning:

- Contract Review Checklists (Design and/or Construction) - attach Contract Documents for review as separate documents.
- Risk Exposure Checklist
- Statutory Review Checklist

Subject:

e. Select whom the document will be returned to:

- See original Transmittal. Names of persons to return each checklist will be listed under comments.
- Call CPS at 602-542-1983 if you are unsure which Person(s) should be included on your Transmittal.

To: Select A Person...   ▼

f. Select "Delivery Method" as "Attached."

Sent Via: Select Delivery Method: ▼

g. Under "Submitted For" select "As Requested," and "Action As Noted" select "Approved as Submitted." Select the "Sent Date."

Submitted For:
- ☐ Approval
- ☐ Your Use
- ☐ As Requested
- ☐ Review and Comment
- ☐ Further Processing

Out for Signature
Approved as Submitted
Approved as Noted
Submit
Resubmitted
Returned
Returned for Corrections
Resubmit
Due By
Received
Received as Noted
Sent date

Action As Noted:

h. Under "Items" select "Document.".

ITEMS

Format

Document

i. In the Description Box input the name of the Checklist depending on which document you are returning.
Click on the blue paperclip "Attach File(s)" icon. Select "Upload a file from your computer." VERY IMPORTANT: Click on "Add" to the right of "Items" in order to attach the document in PROCORE.

Description

Attach File(s)   Drag and Drop File(s)

+ Add

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		j. Add any comments you would like under "Comments." COMMENTS B _I_ U ≡ ≡ ≡ ⋮≡ ≟≡ ⊒ ⊒ ✂ ▯ ▯ ᴬᴮᶜ Font Sizes ▾ A ▾ A ▾ ↶ ↷ k. Select "Create and Email" at the bottom right of the screen: Create and Email
4	CCO/PO/CPS	CCO/PO/CPS will review documents to ensure all signatures have been obtained.
5	PROCORE	A copy of the Signed Transmittal(s) will be retained in PROCORE under Transmittals.